



Purchasing Activities

Creating a Change Request to Description

Overview:

Understanding the Change Request Creation Process

This tutorial provides instructions for creating change requests.

The ability to create changes in OMNI will depend on the status of your order as well as the type of order. If you are having trouble submitting your change through OMNI, you may need to submit a paper change request (<http://purchasing.fsu.edu/content/download/43463/299357>) form located on the Purchasing Web Site.

Once a PO is created changes to Budget Information, adding a line and Vendor must be done using the change request form.

Scenario:

In this topic, you will learn the steps to create a change request.

Key Information:

Requisition Number

Information to be updated





Step	Action
1.	Click the Financials 9.1 link.
2.	Click the Main Menu button.
3.	Click the eProcurement menu.
4.	Click the Manage Requisitions link.

Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: FSU01 Request Name: Request Status: All but Complete Budget Status: Request ID: Date From: Date To: 02/13/2011 Requester: SSEMINOLE Entered By: MFELDMAN PO ID:

Search Clear

Requisitions

To view the life span and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000612167	0000612167	FSU01	02/13/2011	PO(s) Dispatched	Valid	642.00 USD	<Select Action> Go
0000612186	0000612186	FSU01	02/13/2011	Pending	Not Chk'd	386.84 USD	<Select Action> Copy Requisition Go
0000612165	0000612165	FSU01	02/13/2011	PO(s) Dispatched	Valid	237.40 USD	Edit Requisition Go
0000612164	0000612164	FSU01	02/13/2011	PO(s) Dispatched	Valid	649.00 USD	Receive Order Go
0000612163	0000612163	FSU01	02/13/2011	Pending	Not Chk'd	250.00 USD	View Approvals Go
0000612162	0000612162	FSU01	02/13/2011	Pending	Not Chk'd	178.00 USD	View Printable Version Go
0000612181	0000612181	FSU01	02/13/2011	Pending	Not Chk'd	1,590.00 USD	<Select Action> Go
0000612160	0000612160	FSU01	02/13/2011	Pending	Not Chk'd	3,860.00 USD	<Select Action> Go
0000612159	0000612159	FSU01	02/13/2011	Pending	Not Chk'd	454.34 USD	<Select Action> Go
0000612158	0000612158	FSU01	02/13/2011	Pending	Not Chk'd	400.00 USD	<Select Action> Go
0000612136	0000612136	FSU01	02/02/2011	Pending	Not Chk'd	2,119.30 USD	<Select Action> Go

Step	Action
5.	Find the desired Requisition and click the Edit Requisition list item for the corresponding Requisition.



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Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: FSU01 Requisition Name:

Requestion ID: Request Status: All but Complete Budget Status:

Date From: Date To: 02/13/2011



Requester: SSEMINOLE Entered By: MFELDMAN PO ID:

Search Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000612167	0000612167	FSU01	02/13/2011	PO(s) Dispatched	Valid	642.00 USD	Edit Requisition Go
0000612166	0000612166	FSU01	02/13/2011	Pending	Not Chk'd	386.84 USD	<Select Action> Go
0000612165	0000612165	FSU01	02/13/2011	PO(s) Dispatched	Valid	237.40 USD	<Select Action> Go
0000612164	0000612164	FSU01	02/13/2011	PO(s) Dispatched	Valid	649.00 USD	<Select Action> Go
0000612163	0000612163	FSU01	02/13/2011	Pending	Not Chk'd	250.00 USD	<Select Action> Go
0000612162	0000612162	FSU01	02/13/2011	Pending	Not Chk'd	178.00 USD	<Select Action> Go
0000612161	0000612161	FSU01	02/13/2011	Pending	Not Chk'd	1,590.00 USD	<Select Action> Go
0000612160	0000612160	FSU01	02/13/2011	Pending	Not Chk'd	3,860.00 USD	<Select Action> Go
0000612159	0000612159	FSU01	02/13/2011	Pending	Not Chk'd	454.34 USD	<Select Action> Go
0000612158	0000612158	FSU01	02/13/2011	Pending	Not Chk'd	400.00 USD	<Select Action> Go
0000612136	0000612136	FSU01	02/02/2011	Pending	Not Chk'd	2,119.30 USD	<Select Action> Go

Step	Action
6.	Click the Go button. 
7.	You will receive this pop up message once your requisition has entered approval workflow. Click the OK button to proceed. 



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Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Web Special Request

Special Item

*Item Description: Sch 80 T606 T6 Al pipe, 0.500 in wall

*Price: 177.50000 *Currency: USD

*Quantity: 3.0000 *Unit of Measure: FT

*Category: 4110000001 Due Date: 02/28/2011

Vendor ID: 0000007780 Suggest New Vendor

Vendor Name: SHAW STAINLESS

Description	Qty	UOM
Sch 80 T6061 T6 Al pipe, 0...	3	FT
Sch 40 T6061 T6 pipe	2	FT
Shipping	1	EA

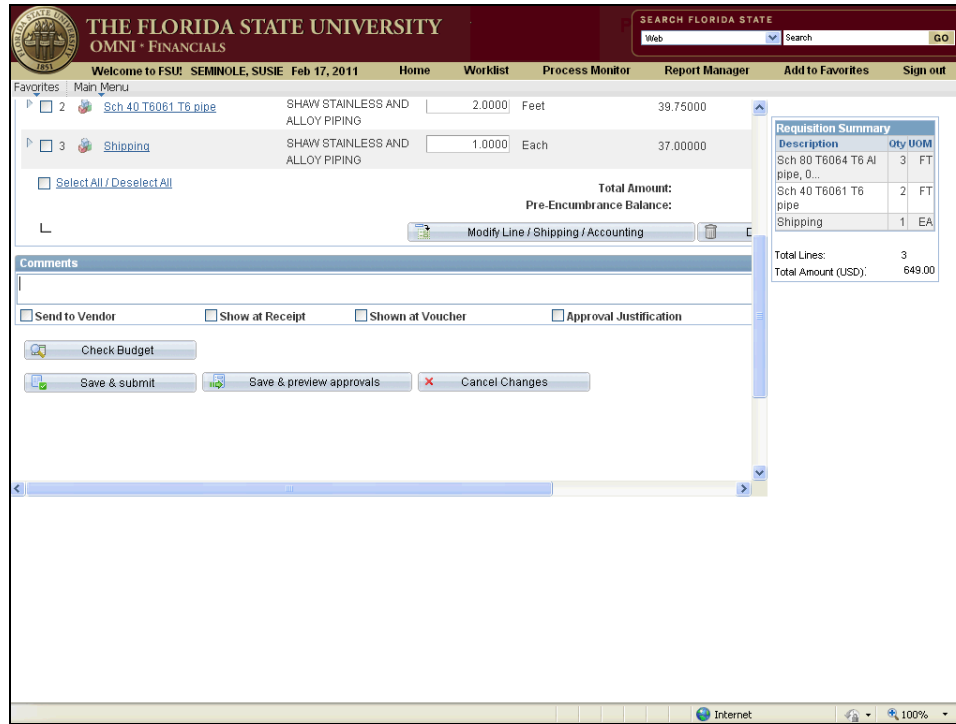
Total Lines: 3
Total Amount (USD): 649.00



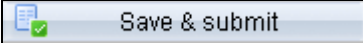
Step	Action
8.	<p>Update the line description as needed.</p> <p>For this scenario the vendor is substituting item # T6064 in place of item # T606. To prevent the payment from being held up you must update the PO to match the expected shipment. Non eMarket orders only.</p> <p>For the purpose of this example, enter "4" at the end of item # T606 in the Item Description field.</p>



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Step	Action
9.	<p>Add Comments to explain the changes made.</p> <p>For the purpose of this example enter the reason, date and the initials of the person making the change and if it should be dispatched to the vendor, enter: "Updated description part number line 1, vendor replacement part, 2/17/11, SS, Do not send this to vendor " into the Comments field.</p>
10.	<p>The above comments will print on the PO if you click the Send to Vendor option.</p> <p></p>
11.	<p>You must select the Approval Justification option to send your comments to your approvers and buyers.</p> <p></p>
12.	<p>Click the Save & submit button.</p> <p></p>



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Requested For: SEMINOLE, SUSIE Number of Lines: 3

Requisition Name: 0000612164 Total Amount: 649.00 USD

Requisition ID: 0000612164 Pre-Encumbrance Balance: 0.000

Business Unit: FSU01 Justification: Updated description part number line 1, vendor replacement part. C send this to vendor. SS 2/17/11

Status: See Lines

Priority: Medium

Budget Status: Valid

Description	Qty	UOM
Sch 80 T6064 T6 AI pipe, 0...	3	FT
Sch 40 T6061 T6 pipe	2	FT
Shipping	1	EA
Total Lines:	3	
Total Amount (USD):	649.00	

Requisition Approval Workflow

Line 1: Pending
Sch 80 T6064 T6 AI pipe, 0.500 in wall

Req Approval Workflow Path

Pending

https://qa.financials.omni.fsu.edu/psp/sqna02/EMPLOYEE/ERP/h?tab=DEFAULT

Step	Action
13.	Click the Home link. Home
14.	Congratulations! You have completed this topic.